



State of Montana Project Management Office

Project Initiation and Planning Phase

Project Influencer Instructions

This document is intended to provide a brief guideline and accompanying worksheet/plan template that allows you to:

- Identify all those who could have an influence on your project, including stakeholders who care about the outcome of the project, and critical information sources.
- Assess the nature of their impact and thus determine what types of information they need to receive during the project.

Document a plan for how, what, and how often to communicate to those influencers during the project to ensure that expectations are met, information is exchanged and the project meets its goals.

This is important because projects do not take place in an isolated environment. Projects will experience positive and negative influences from a variety of sources, many of them specific people or groups. People can influence a project dramatically for the worse by refusing to commit resources, by not being available for reviews, or by failing to provide key specifications or specialized knowledge the project needs at the right time. However, if the team identifies, communicates with, and proactively involves those influencers from the start, the project will feel the positive impact of their participation.

Therefore, during project initiation and planning, it is important to consider the factors and individuals inside and outside the organization that can aid or impede the project through their attitude toward the project and their related action (or inaction). Then the team should start working with those people and plan for the proper communication with those influencers during the project.

How to Use

1. During the Initiation Phase of your project, create an initial Project Influencer Assessment to identify which people and groups have the potential to impact your project.
2. Immediately contact and start working with influencers who are key to the early days of your project.
3. Update the Influencer Assessment as project goals are solidified; often the details of scope, schedule and resources will surface other project influencers.

4. As the planning phase of your project progresses, start filling in the “communication” columns of the form. This will set the team up to have proper, effective communication with the influencers throughout the project.
5. Before you exit the planning phase, you should have a full-blown Project Stakeholder and Influencer Assessment and Communication Plan.

Keep this compact form handy during project execution to sanity check whether the project team is keeping all influencers (including key project stakeholders) informed and properly involved in reviews.

Why Analyze the Project Influencers

Projects do not take place in an isolated environment. Projects will experience positive and negative influences from a variety of sources, many of them specific people or groups.

Some “influencers” are obvious:

- The **customers** of what the project is delivering, who should influence the goals and detailed requirements the project is to meet.
- The **managers** who own the resources the project needs and, therefore, influence the project’s ability to meet its goals.

But there are usually far more actual influencers than that. The number of influencers of a project often relates directly to the amount of change, both obvious and subtle, that the project will bring.

For example, the project could cause changes to:

- Organizational processes if it is a project to streamline a business process and introduce new tools. Thus, the project can affect the work of quite a number of people, which may not be perceived by all as a good thing!
- The company’s product line if it is a project to introduce a new product and possibly phase out an old one. Thus, the project will affect what the sales people are selling and what they have to know to do their jobs, what manufacturing is creating and their purchasing schedules, and so forth.
- Staffing levels or assignments in one or more functional groups if the project is a cross-functional endeavor. Thus, the project can affect one or more managers of resources who are now asked to contribute to a new project, which may negatively impact efforts to which the resources were already assigned.
- Other projects if the project is high priority and needs significant staff from various areas and ends up causing resources from other projects to transfer over.

During project initiation and planning, it is important to consider the factors and individuals inside and outside the organization that can aid or impede the project, through their attitude toward the project and their related action (or inaction); and to do so with an eye on the changes the project will cause to various groups to ensure that all influencers are truly accounted for.

Types of Influencers

There are two general categories of Project Influencers:

Stakeholder - A stakeholder is an individual who, because of the actual or potential changes caused by the project:

- Benefits from the project in one way or another.
- Is negatively affected by the project, by project activities or by the project's overall outcome.
- Perceives that he/she is positively or negatively affected .

Stakeholders can include people such as:

- Executive management of the company, who are concerned with the project achieving the business objectives the company is after.
- Resource managers who must supply resources to the project and thus whose own department's plans and budgets are affected by the project. These managers also often have a stake in how the project is implemented; e.g. the Customer Service manager has a stake in how serviceable a new product's design is.
- Customers, specifically the people who will pay for what the project is producing and must be satisfied that the deliverable is what they wanted and is worth what they must pay for it.
- Users of the project's deliverables, who are sometimes the same as the customer, but specifically, whether they personally pay for the item or not, they are the people who will use what this project is producing. They too need to be happy with how the project's deliverable meets their needs.
- Information Source - An information source is an individual or group that, due to special knowledge, may provide useful or absolutely necessary information to the project. For example:
- Customers, who have opinions on features, key needs, or knowledge of the priorities for these key needs or important insights to past versions of what this project is producing.

- "Historians" of similar projects, who may have valuable information for project planning, problems to avoid, or approaches to use.
- Internal departments that may not have direct 'deliverables' as part of the project but can influence how the project is conducted or what it produces, such as public affairs, legal, communications and human resources.
- Functional staff whose expertise is specifically needed to accomplish identified project work, e.g. manufacturing, or service representatives who will be part of specifying, reviewing and ultimately deploying the project.
- Subject Matter Experts (SMEs) that are inside or outside the organization whose expertise is needed for development, reviews, testing, etc.
- Staff to key stakeholders, who may influence what information the project teams are able to get to or receive from that stakeholder.
- Industry associations who may leverage their influence in supporting or criticizing the new product.
- Regulatory agencies, who must grant approvals.

How to Analyze Influencers and Plan Actions and Communications

The goal is to develop a simple action plan to involve individuals or groups whose knowledge or sphere of influence could affect the project, positively or negatively.

Use the steps below and the form on the following page to create a draft Influencer Assessment and, ultimately, communication plans for interacting with them.

1. Before you start filling out the form, identify what will change due to this project, to help you identify potential influencers. Whatever is going to change, that change will likely influence one or more people or groups, so they will need to appear on your influencer list.

For example:

- New product, line of business
- New customer group served
- New internal business/operational processes
- Changes to project priorities
- Resource reallocations among projects
- Hiring needed in some groups

- Changes in customer relationships
2. Identify Project Influencers by name, such as those who:
 - Benefit from the project
 - Have been involved in similar projects before
 - Perceive they are at risk because of this project
 - Have strong opinions on topics touched by this project
 - Will have control over key resources needed for the project
 - Are subject matter experts inside or outside the company
 - Are unique customers or suppliers
 - Are influential individuals who may tend to make decisions without informing and/or consulting project teams
 3. Consider each influencer's areas of concern—what they care about—to help determine what the team needs to communicate with them about.
 - **Business factors:** For example, Executive Management stakeholders need to know that the project is meeting the financial and other business goals of the company, including items such as:
 - Cost, margin targets and profitability of a new product
 - Revenue and market share projections
 - Entry into the market, e.g. project dates for customer shipments, partnership deals signed, volume ramp-ups, full availability to sell at volume in the market
 - Competitive positioning, e.g. how the features of a new product will stack up against what competition is offering
 - Projected cost savings (for project aimed at operational efficiencies and cost reductions)
 - **Project factors:** For example, functional group managers and team members will care about the aspects of the project that affect their work:
 - Scheduling: when resources are needed and items are due according to the schedule
 - Resources: what resources, skills, equipment etc., are needed

- Scope: what the project has to produce and who is responsible for what
- Design decisions: what technical or other decisions about the implementation affect each stakeholder or information source
- **Personal factors**
 - Risk Profile: Whether the influencer has a high or low risk tolerance and how that should translate to how much information they will want to receive, how often, and at what level of detail to make them feel comfortable.
 - Adoption Profile: Whether the influencer is by nature an aggressive/early adopter, mid-level, or late adopter of new technologies or approaches, which can translate to how much they will want to be involved in creation or reviews of new approaches (e.g. business processes the project is causing to change).
 - Focus: Whether the person is most concerned with short-term, mid-term, long-term goals or details, which will influence what the team needs to communicate with this influencer about.

Explanation of the fields:

- **Person:** The person who is a Project Influencer and the position they hold.
- **Why they are an Influencer:** Mention whether they are stakeholder or information source, and a few words about how this project impacts them or what information they need to provide.
- **Initial Actions:** What needs to happen to initiate effective interaction with this influencer?
- **Communication Type:** Indicate Formal or Informal, Planned or Spontaneous. Communication may include one or a mix of these communication types during the project.
- **Frequency:** To keep this person properly informed and involved, how often should the team or PM interact with that person? The interaction may be at different frequencies during different phases of the project.
- **Communications Means:** What is the best means of communicating with this person in order to address the concerns and interests they have as an influencer? There may be multiple means to match the different concerns of the person or different means appropriate at different times of the project.

Administrative Information

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